

Introduction



This volume of the Federal Student Aid (FSA) Handbook discusses how to calculate, award, and disburse the proper amounts for the various Title IV programs.

RECENT CHANGES

Here are some of the significant changes to Volume 3 for the 2016-17 award year:

Chapter 1

- Sidebar on weeks of instructional time in distance education and competency-based programs added.
- Added regulatory citations for late Direct Loan disbursements.
- Amended guidance on timing of late disbursements for various programs.
- Sidebar with regulatory citations added on retroactive disbursements and prior year charges.
- Added sidebar regulatory citation for late Direct Loan disbursements.
- Guidance on retaking coursework in term programs updated.

Chapter 2

- Guidance added on including books and supplies in the tuition and fees COA component. Sidebar with regulatory citation also added.
- Sidebar with regulatory citation added on the timing of providing funds for books and supplies.
- New example: “Pell Grant awards & COA with mixed enrollment status” added.

Chapter 3

- Updated guidance on Career Pathway Alternative for Title IV & Pell eligibility. Pell alternative schedules no longer used.
- Updated and expanded guidance on minimum Pell Grant and LEU.
- Eligibility under ATB alternatives for Career Pathway Programs sidebar added, with statutory and Dear Colleague Letter citations.

Program and systems information online

www.fsadownload.ed.gov

Software:

- Direct Loan Tools
- EDconnect
- EDExpress for Windows
- SSCR for Windows

Technical References and User Guides for:

- CPS (ISIR, Summary of Changes, etc.)
- COD
- Electronic Data Exchange
- EDExpress Packaging

www.ifap.ed.gov

- Federal Registers
- Electronic Announcements
- Dear Partner/Colleague Letters
- FSA Assessment modules:

Student Eligibility—

www.ifap.ed.gov/qahome/fsaassessment.html

Comments? Questions?

If you have any comments or questions regarding the FSA Handbook, please contact Research and Publications via email at fsaschoolspubs@ed.gov.

- Updated Pell Grant award amounts for 2016-17.

Chapter 4

- Updated Sequester Dear Colleague Letter reference and amounts.
- Added sidebar on TEACH Grant resources, with hyperlinks: FAQs, Low-income School Directory, Highly Qualified Teacher fact sheet, Teacher nationwide shortage areas, and TEACH Grant certification form.

Chapter 5

- Clarified and expanded guidance on minimum and maximum loan periods for certain students.
- Guidance for refusing to originate or originating for less than maximum eligibility clarified.
- Clarified guidance for students completing a program and starting another at the same school.
- Expanded and updated guidance for Direct Loan periods when a student transfers to a new school.
- Language in transfer student with overlapping academic years example clarified.
- Remaining loan eligibility on transfer/program change example 2 language clarified.
- Several E-Announcement citations added to Subsidized loan eligibility limitation (150% rule) sidebar.
- Expanded and updated Subsidized Loan Eligibility Time Limitation (150% rule) main section.
- Added new sidebar: When to update loan periods and academic years?
- Added new sidebar: Common COD/NSLDS reporting issues, along with E-Announcement citation.
- New example added: 150 Percent Rule: Calculation and reporting, loss of subsidy.
- New example added: 150 Percent Rule: Remaining eligibility period of less than one year.

Chapter 6

- New guidance on Perkins Loan Extension Act added, along with statutory, DCL and regulatory sidebar citations.
- Added guidance on additional Perkins required disclosures.

Chapter 7

- New FSEOG & Pell LEU guidance added.